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Regional Markets: Smokestack East
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Keeping Your Employees On The Job With Incentive Programs

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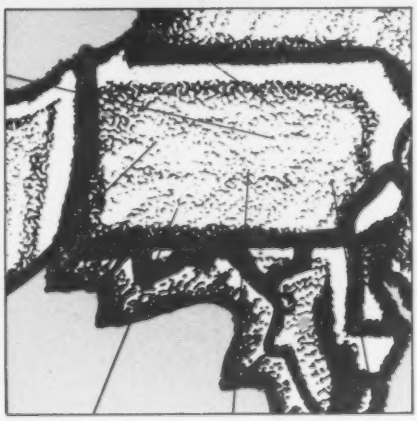

FEATURES

***AM's* Top 100** 32

This year, we've added jobber/retailing chains to our Top 100 list to reflect the "merging market." And, we include many more charts on the top chains in several categories like number of service bay and performance product sales.

Regional Markets:
The DIYers Of Smokestack East 30

In our on-going series about DIYers in different areas of the country, we take a close look at the DIYers of Smokestack East. What kinds of vehicles to the DIYers in this area of the Eastern Seaboard drive? What kinds of products to they buy? Here are some answers.

Operations:
After The Thief Has Struck 49

You can recover your losses after the thief has struck through write-offs, insurance, and penalties.

Employees:
Incentives Can Keep Good Employees On The Job 50

Today, retailers must learn to motivate and retain their employees in order to meet increasing demands for quality customer service.

DEPARTMENTS

Detailing The Market	5	Reps	60
Editorial	16	Ad Index	63
Market Line	18	Reader Servic Card	65
Products	54		

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This year, we've added jobber/retailing chains to our Top 100 list to reflect the "merging market."

by **P. Royall Katcher,**
Business Editor

In past years our annual Top 100 list has seen many changes due to chains being acquired, changing their names, or going out of business. This year, however, in terms of volume retailers, the 1990 Top 100 is not radically different than that published in 1989.

That's not to say there have been no changes. A number of companies announced new CEOs since our last October's list.

- Julius Trump is now CEO of Northern Automotive, which is owned by Northern Pacific. Trump is also Northern Pacific chairman.
- Michael Ormiston is Parts Inc.'s new CEO.
- John Willingham is the new CEO at PACCAR, the parent company of the West Coast chains of Grand Auto and Al's Auto Supply.
- Bob Merrill is now the CEO at Houston's Pettigrew Smith/Dales.

Some Changed Numbers

A number of chains have continued growing in the nine months since we published our last Top 100. We've listed the ten fastest growing chains elsewhere, but some chains like Pep Boys, which posted a growth of 1%, with three new stores since last October, should also be mentioned. AutoZone opened 26 stores, a 5% growth. Trak opened 17 new stores. O'Reilly Automotive, owned by Ozark, and Maryland's Hi-Gear each opened five new stores. ADAP, in New England, continued its growth drive by adding six new stores.

A few chains from last year have run into hard times. Minnesota-based 10,000 Auto Parts was listed with 30 stores last year, but was forced to close all its stores shortly thereafter. Recently, new management has acquired the company and has announced that it will reopen nine of its stores immediately.

Crazy Joe's, headquartered in Kannapolis, NC, ran into financial problems and sold many of the 29 stores it had last year. Parks Auto Stores in South Carolina and Advance Auto in Virginia picked up many old Crazy Joe's locations. Now Crazy Joe's operates three stores.

Crazy Joe's operates three stores.

At the same time, other chains have been consolidating their operations to improve their bottom lines. Northern Automotive shuttered 55 stores since October. New York's Aid Auto increased the number of stores bearing its logo through franchises, while dropping to only two company-owned stores. Action Auto, in Michigan, has closed 17 stores. Houston's Pettigrew Smith/Dales closed 15 stores. Michigan's Fox Group, which runs stores under the names of Shorts Auto Parts, All-Parts Automotive, and Tony's Parts & Accessories, shut seven stores. And, Atlanta's Parts City, closed five stores.

The only high-performance or speed specialty chain we have tracked that has grown has been Super Shops, which is one of our ten fastest growing chains. Most of the other specialty performance chains we've been tracking, however, have closed stores during the past nine months. In fact, we were unable to contact S/C Performance Wholesale, a Gardena, CA-based speed shop which had operated 29 stores, either by mail or telephone.

Fewer Service Bays

Last October we said that the top 100 chains had among them 6,264 service bays. Today, our ten largest service providers have almost that many service bays alone, with 6,043 bays between them. They obviously have most of the retail professional service market, since there are only 35 more bays among all the other chains with service. Overall the year saw a drop in the retail professional service bay number to a total of 6,078, or 3%.

Some of this drop may be because we have done one thing to this year's list that does radically alters its composition. We changed our methodology this year from past years, in line with what we've been calling the "merging market." No longer are there as many clear differences in the minds of consumers and retailers alike between jobber/retailers and volume retailers as there were in years past. A DIYer is just as apt to buy his needed parts at a store with a NAPA logo outside as he is from a Pep Boys store.

Therefore, where in the past we tried to keep our Top 100 list to chains selling over 60% retail, this year we list every chain that sells anything automotive across the counter for cash at full or sale price to a consumer. Most of these jobber stores, however, don't have service bays.

We've also added more information to the list. If a chain told us it belonged to a programmed distribution or buying group, we've indicated that with footnotes. We've indicated what percentage of DIY, retail sales each chain told us it did. And, if a chain is owned by a parent corporation, such as ADAP being owned by the drug chain Rite Aid, we've added the parent's name in parentheses behind the retail chain name.

It's interesting to note, too, that the largest single type of owner continues to be drug chains. Rite Aid owns ADAP; Harco Drug owns The Carport; and Fay Drugs owns Wheels Discount Auto Stores. The Perry Drug saga has apparently not scared off potential drug chains from acquiring auto parts chains. ■

THE 1990 *AM* LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)	CEO	Address and Phone	% of DIY
1.	Northern Automotive [1]	825	150	770,000	Julius Trump	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200	95%
2.	Genuine Parts [16]	570	0	500,000	Larry L. Prince	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700	30%
3.	AutoZone	535	0	535,000*	Peter Formanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	95%
4.	Chief Auto Parts Inc.	500	0	292,500*	Mike Manor	15303 Dallas Pkwy, Ste 800, Dallas, TX 75248 (214) 404-1114	95%
5.	Western Auto	332 [2]	1,489	1,200,000	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	95%
6.	Trak Auto	309	0	275,700	Edward E. Szydlik	3300 75th Ave., Landover, MD 20785 (301) 731-1200	95%
7.	Nationwise Automotive, Inc.	275	346	290,000*	Saul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	95%
8.	The Pep Boys	267	2,400	798,691	Mitchell G. Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	99%
9.	Parts Inc. [4]	203	0	145,500*	Michael Ormiston	601 S. Dudley, Memphis, TN 38104 (901) 523-7711	35%
10.	Advance Stores Co.	170	0	100,000*	Nicholas Taubman	1342 W. Eighth, Roanoke, VA 24015 (703) 345-4911	99%
11.	Fisher Auto Parts	150*	0	107,500*	Art Fisher	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901	20%
12.	Super Shops	145	350	180,000	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660 (714) 644-9900	95%
13.	PACCAR [5]	140	600	200,000*	John Willingham	1400 North 4th St., Renton, WA 98055 (206) 251-7600	93%
14.	Discount Auto Parts, Inc.	125	0	75,000*	Denis L. Fontaine	4900 S. Frontage Road, Lakeland, FL 33802 (813) 687-9226	99%
15.	Whitlock [3]	121	0	71,000*	Dean Haulton	1375 Mt. Prospect Rd., Des Paines, IL 60018 (708) 699-5040	95%
16.	Sieg Auto Parts	121	0	45,000	Mads Sulg	500 Iowa St., POB 4230, Davenport, IA 52808 (319) 323-3641	5%
17.	APS [16]	113	0	80,000	Richard J. Spelleri	3000 Pawnee St., Houston, TX 77054 (713) 741-2470	30%
18.	O'Reilly Automotive (Ozark)	107	0	85,000	Charles O'Reilly	233 S. Patterson, Springfield, MO 65802 (417) 862-3333	55%
19.	Hi/Lo Auto Supply Companies [6]	104	0	113,700	T. Michael Young	8601 Tavanor, Houston, TX 77057 (713) 991-6052	85%
20.	General Parts [15]	102*	0	75,000*	Temple Sloan	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813	20%
21.	Straus-Frank Inc. [15]	92	0	70,000	David Straus	POB 600, San Antonio, TX 78292 (512) 341-5531	30%
22.	Rose Auto Stores (Whitlock)	90	0	53,000*	Donald Goodman	4760 NW 165th St., Hialeah, FL 33014 (305) 625-7786	95%
23.	ADAP (Rite Aid)	80	0	62,000	Wayne Yodzio	660 Bodwell St., Ext. Avon, MA 02322 (617) 587-8400	99%
24.	R&S/Strauss (Whitlock)	75	168	107,000*	Alfred Woods	1835 Burnet Ave., Union, NJ 07083 (201) 686-8200	95%
25.	Hahn Automotive	74	0	73,000*	Mike Futerman	415 W. Main St., Rochester, NY 14608 (716) 235-1595	40%

* Automotive Marketing estimate for 1989.
[1] Includes Checker/Schuck's/Kragen, Auto Works, U-Save, and Crown Auto
[2] Includes company-owned stores only; with associate stores total is 1,850
[3] Includes Giant Auto, Motormart, National Auto, and Strum Auto.
[4] Includes National Automotive Superstores, Save Auto Stores
[5] Includes Al's Auto Supply and Grand Auto
[6] Includes Fischer's Auto Parts
[15] A member of the Carquest (Tarrytown, NY) programmed distribution group
[16] A member of the NAPA (Atlanta) programmed distribution group
[18] A member of the Big A (Houston, TX) programmed distribution group

TOP RETAILERS

The sweeping changes of mergers and acquisitions that had marked the retail aftermarket in recent years has apparently slowed down. Take, for example, the Top 10 retailers we listed in June 1987, our first such list, with that of today. Chains that appeared on that list included Checker/Schuck's/Kragen (now part of Northern Automotive), and Otasco and Perry's Drugs, now both out of business. In other words, almost a third of the 1987 list has vanished in its original form.

Moreover, Auto Shack on that list now trades under the name of AutoZone.

Changes from last year to this aren't nearly as radical as those from three years ago.

Last year our Top 10 retailers were, in order,

- Northern Automotive,
- AutoZone,
- Chief Auto Parts,
- Western Auto,
- Trak Auto,
- The Pep Boys,
- Ward White Group,
- Nationwise Automotive,
- Advance Stores,
- and Super Shops.

This year our list is exactly the same—except Nationwise and Pep have switched places and we have split the Ward White Group up into its three autonomous chains—Whitlock, Rose, and R&S/Strauss—following its sale from the British Ward White concern to a private, American investment group.

The result of our Ward White split-up is that PACCAR, which operates stores under a variety of names, has now joined the prestigious Top 10 retail list.

It is interesting that while most aftermarket retailers don't operate service bays, six of the Top 10 retailers do have such bays. And, four of the top retailers are on our fastest growing Top 10 list.

THE *AM* TOP 10 RETAIL CHAINS

(Chains doing 90% or more retail/DIYer sales, based on their reported number of stores; showing their place on Top 100 list.)

List #	Chain	100 List #	% DIY	Address
1.	Northern Automotive	1	95%	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
2.	AutoZone	3	95%	3030 Poplar Ave., Memphis, TN 38111
3.	Chief Auto Parts Inc.	4	95%	15303 Dallas Pkwy, Suite 800, Dallas, TX 75248
4.	Western Auto	5	95%	2107 Grand Ave., Kansas City, MO 64108
5.	Trak Auto	6	95%	3300 75th Ave., Landover, MD 20785
6.	Nationwise	7	95%	3750 Courtright Ct., Columbus, OH 43227
7.	The Pep Boys	8	99%	3111 W. Allegheny Ave., Philadelphia, PA 19132
8.	Advance Stores Co.	10	99%	1342 W. Eighth, Roanoke, VA 24015
9.	Super Shops	12	95%	620 Newport Center Dr., Suite 860, Newport Beach, CA 92660
10.	PACCAR	13	93%	1400 N. 4th St., Renton, WA 98055

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	% DIY
26.	Republic Auto [11]	72	0	627,000	Keith Thompson	POB 2088, Brentwood, TN 37024 (615) 373-5275	40%
27.	Parts Depot/Steego Auto Parts	72	0	40,000	Rollance Olson	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001	40%
28.	Crow-Burlingame	72	0	34,000	Fletcher Lord, Jr.	520 W. Capitol, Box 111, Little Rock, AR 72203 (501) 372-5275	25%
29.	Quality Stores	64	100	90,000*	John L. Hill	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	95%
30.	Hi-Gear Tire & Auto Supply	61	0	36,000*	Stan Love	110 Ritchie Rd., Capitol Heights, MD 20743 (301) 336-3000	95%
31.	A.I. Automotive [28]	60	0	10,000	Stuart Baxter	Bldg 200, Ste 508, Nashville, TN 37217 (615) 367-9495	30%
32.	Action Auto [7]	50	300	104,700	Dick Sabo	2128 S. Dort Hwy, Flint, MI 48507 (313) 235-5600	95%
33.	Brooks Auto Parts/Supply [16]	50	0	36,000*	Elton D. Brooks, Jr.	402 S. Peterson Ave., Douglas, GA 31533 (912) 384-7818	45%
34.	Kentucky Motor Service (KOI)	50	0	36,000*	Anthony W. Neltner	POB 395, Covington, KY 41011 (606) 431-6025	30%
35.	Forest City Auto Parts Co., Inc.	50	0	29,000*	Arnold Bellowe	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	90%
36.	Big Bear Stores	46	0	32,000	Jerry Hammerel	640 54th Ave. N., St. Cloud, MN 56301 (612) 251-9000	95%
37.	Pettigrew-Smith/Dale's	43	0	25,000*	Bob Merrill	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	95%
38.	Ace Auto Parts	39	0	23,000*	Thomas D. Cox	4750 118th Ave., N., Clearwater, FL 34622 (813) 573-2800	95%
39.	Taylor Parts, Inc. (TPS)	36	0	55,000	James M. Taylor II	208 E. 3 Notch St., Andalusia, AL 36420 (205) 222-6534	40%
40.	Big Wheel Auto/Rossi Stores [14]	36	0	24,000	R.B. Shaller	2300 P. Lot Knob Rd., Mendota Heights MN 55120 (612) 452-7484	95%
41.	Main Auto Parts	35	0	25,000*	Bart Weprin	1422 N. Main, Dayton, OH 45405 (513) 277-7393	20%
42.	Anderson Auto Parts [16]	35	0	21,000	H.G.Anderson III	POB 767, Anderson, SC 29622 (803) 224-6321	15%
43.	The Carport (Harco Drug)	34	0	20,000*	David Fuhrman	3925 Rice Mine Rd., Northport, AL 35476 (205) 345-2400	85%
44.	Murray's Discount Auto Stores	34	0	20,500*	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	50%
45.	Worldwide Auto Parts, Inc.	31	7	19,000	Jim Foos (COO)	87 Brooklyn Ave., Youngstown, OH 44507 (216) 782-2204	95%
46.	Northern Auto Supply Co.	30	0	17,500	Don Komis	1906 N. Peach St., Marshfield, WI 54449 (715) 384-2124	25%
47.	J. Burdman Auto Parts	30	0	5,000	Bernard Burdman	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787	15%
48.	Benny's	29	12	25,000	Malcolm C. Bromberg	340 Waterman Ave., Esmond, RI 02917 (401) 231-1000	95%
49.	Linkon's Auto Supply	29	0	6,000	Leonard Linkon	2720 E. 2nd St., Centralia, IL 62801 (618) 533-1311	50%
50.	Automotive One Parts Stores [31]	28	0	17,000	Robert H. Gentry III	701 W. Church St., Orlando, FL 32802 (407) 422-1110	45%

* Automotive Marketing estimate for 1989.
[7] Includes company-owned stores only; with franchises total is 57
[11] Includes B&C Auto Supply
[14] A member of the RPM (Roanoke, VA) buying group
[16] A member of the NAPA (Atlanta) programmed distribution group
[28] A member of the Bumper to Bumper (New York) programmed distribution group
[31] A member of the IWDA/Road Pro (Houston) programmed distribution group

TOP REPORTED SALES

We're limited, in listing the Top 10 automotive chains by sales, to chains that actually publish sales figures. Since by far the majority of chains in the industry are privately held and decline to release sales figures, this list is bound to be incomplete and leave out many major sales-producing chains.

Yet, this list is informative in itself, especially when compared with other lists in this section.

The top three sales reporters are also majors in the professional service field. In fact, the top two on each list are The Pep Boys and Western Auto. When broken out, chains that have service report average store sales of almost a million and a half dollars per store. On the whole, volume retailers only report a half a million annual sales per average store. This would confirm what we've been saying for some years now: Service pays.

Otherwise, two of our top sales reporters are jobbers, but also produce an important percentage of their overall sales from retail, DIY, buyers. They are Republic, with 40% of its sales retail, and Genuine Parts, with 30% of its sales retail.

One of the Top 10 is a specialty speed and performance chain, Super Shops. It has also bucked the trend of closing performance stores we've seen among other speed shop trends to also be one of the Top 10 chains in terms of growth. Trak and O'Reilly are also on the Top 10 growing chain list.

THE *AM* TOP 10 CHAINS REPORTING ACTUAL SALES

(Based on sales figures provided by each chain, in thousands of dollars.)

List #	Chain	100 List #	Sales	Address
1.	Western Auto	5	$1,200,000	2107 Grand Ave., Kansas City, MO 64108
2.	The Pep Boys	8	798,691	3111 W. Allegheny Ave., Philadelphia, PA 19132
3.	Northern Automotive	1	770,000	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
4.	Republic Auto	26	627,000	POB 2088, Brentwood, TN 37024
5.	Genuine Parts	2	500,000	2999 Circle 75 Pkwy., Atlanta, GA 30339
6.	Trak Auto	6	275,700	3300 75th Ave., Landover, MD 20785
7.	Super Shops	12	180,000	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
8.	Hi/Lo	19	113,700	8601 Tavenor, Houston, TX 77057
9.	Action Auto	32	104,700	2128 S. Dort Hwy, Flint, MI 48507
10.	O'Reilly Automotive	18	85,000	233 S. Patterson, Springfield, MO 65802
	TOTAL SALES		$4,654,791	

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)[a]	CEO	Address and Phone	% DIY
51.	Twin "B" Auto Parts [14]	28	0	15,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	99%
52.	Ben Pilla Speed Shops	28	0	11,000	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	95%
53.	Cardis [15]	27	0	17,000	Ken Walker	12950 E. Alondra Blvd., Cerritos, CA 90701 (213) 926-4492	45%
54.	ITM Automotive Parts	26	0	26,000	Ed Lynch	13140 Alondra Blvd., Cerritos, CA 90701 (213) 926-6582	35%
55.	Barnes Motor & Parts	26	0	20,000	Robert E. Kirkland, Jr.	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161	25%
56.	Davis & Wilmar [16]	26	0	17,000[a]	Gary Davis	609 Epsilon Dr., Pittsburgh, PA 15238 (412) 963-7776	30%
57.	Parts City, Inc. (Alex. Seewald)	26	0	13,000	Andy Moye	1420 Seaboard Industrial Blvd., Atlanta, GA 30318 (404) 352-0146	99%
58.	Wheels Discount Auto Stores (Fay Drugs)	25	0	15,000[a]	Gale Mitchell	4577 Buckley Rd., Liverpool, NY 13088 (315) 652-7000	95%
59.	SAS Auto Parts Co.	23	0	20,000	George Segal	129 Manchester St., Concord, NH 03301 (603) 225-4000	25%
60.	Allied Auto Parts Co.	23	0	14,000	Daniel Sennet	43 N. Montello St., Brockton, MA 02401 (508) 588-8500	30%
61.	One Stop Auto Parts	23	0	13,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg, FL 33702 (813) 522-2897	90%
62.	Himel Auto Parts/Motor Supply	23	0	11,000	F. Garacci	1215 E. Main, New Iberia, LA 70560 (318) 364-7201	30%
63.	Kirkham Auto Parts	23	0	10,000	Michael Kirkham	POB 718, Blackfoot, ID 83221 (208) 785-2902	50%
64.	Keenan Auto Parts [15]	22	0	16,000[a]	Frank Ahouse	112 N. Front St., Albany, GA 31703 (912) 436-3311	5%
65.	688 Parts Service, Inc.	22	0	12,000	George E. Tricou Jr.	9126 Green Springs Rd., Baton Rouge, LA 70814 (504) 924-6888	25%
66.	Acme Auto Supply, Inc. [20]	21	0	20,000	James Fine	620 R. Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	30%
67.	Erlich/Airland Auto Parts [22]	21	0	15,000	Herbert August	POB 277, Albany, NY 12202 (518) 449-1176	40%
68.	BWP [15]	21	0	15,000[a]	Neil Stokel	1055 Bronx River Ave., Bronx, NY 10472 (212) 991-9000	1%
69.	Motor Bearings & Parts Co.	21	0	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 8320-3961	1%
70.	Beacon Auto Parts, Inc.	20	0	18,000	Fred Pisciotta	911 Lowry Ave., Jeannette, PA 15644 (412) 527-5612	39%
71.	Foreign Autoparts	20	0	18,000	Steve Palkin	1205 Route One, Sharon, MA 02067 (617) 784-1111	70%
72.	Performance Centers of America	20	0	18,000	Donald R. Raleigh	180 Whitman Ave., Edison, NJ 08817 (201) 287-5200	95%
73.	The Fox Group, Inc. [8]	20	0	16,000	William Fox, Jr.	23444 Schoenherr, Warren, MI 48089 (313) 774-4940	95%
74.	Sturdevant's Inc. [17]	20	0	14,000	Jack Sturdevant	POB 948, Sioux Falls, SD 57101 (605) 336-0678	30%
75.	Giant Auto Parts	20	0	14,000[a]	Robert Levy	2236 S. Hamilton Ave., White Hall, OH 43232 (614) 864-3811	30%

[a] Automotive Marketing estimate for 1989.
[8] Includes All-Parts Automotive, Inc., Shorl's Auto Parts, Tony's Parts & Accessories
[14] A member of the RPM (Roanoke, VA) buying group
[15] A member of the Carquest (Tarrytown, NY) programmed distribution group
[16] A member of the NAPA (Atlanta) programmed distribution group
[17] A member of the Pronto (Springfield, IL) programmed distribution group
[20] A member of the Autovalue (Springfield, MO) programmed distribution group
[22] A member of the AAAD/Parts Plus (Memphis, TN) programmed distribution group

CHAINS WITH SERVICE

The big story in retailers with professional service bays is the large jump in the number of those bays we report now and what we reported last October.

Many of these are newly reported bays. For example, PACCAR now says they've got some 600 bays. Action Auto reports that they've got some 300 now. Northern Automotive reports some 150 now. Champion says that they've got 80 today.

And, other chains have been busy adding service bays along with their new stores. Last year we reported Pep Boys as having 2,226 service bays; this year they have some 2,400. Quality Stores had 20 bays in 1989. They report having 100 today.

As before, bays tend to be concentrated among the larger retail chains. In all, the largest ten retailers with service bays have 6,043 among them. There are only 6,078 service bays, however, among all of the Top 100 aftermarket chains—only 35 more bays than the top ten service providers have.

We've said that service boosts a retailer's business. Indeed, half of this list is made up of companies that also appear on our list of the Top 10 chains when listed by reported sales. Moreover, the average annual store sales for chains with service runs just under $1.5 million, while annual average store sales for chains without service runs around a half a million dollars.

THE *AM* TOP 10 SERVICE PROVIDERS
(Based on number of service bays operated by each chain.)

List #	Chain	100 List #	Svc Bays	Address
1.	The Pep Boys	8	2,400	3111 W. Allegheny Ave., Philadelphia, PA 19132
2.	Western Auto	5	1,489	2107 Grand Ave., Kansas City, MO 64108
3.	PACCAR	13	600	1400 N. 4th St., Renton, WA 98055
4.	Super Shops	12	350	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
5.	Nationwise	7	346	3750 Courtright Ct., Columbus, OH 43227
6.	Action Auto	31	300	2128 S. Dort Hwy, Flint, MI 48507
7.	R&S/Strauss	24	168	1375 Mt. Prospect Rd., Des Plaines, IL 60018
8.	Northern Automotive	1	150	645 Missouri Ave., Suite 400, Phoenix, AZ 85012
9.	Quality Stores	29	100	1460 Whitehall Rd., North Muskegon, MI 49445
10.	Champion Auto	98	80	5520 N. U.S. Highway 169, New Hope, MN 55428
	TOTAL BAYS		5,983	

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	% DIY
76.	Royal Auto Supply	20	0	10,000	Jon Slenn	Twin Park Industrial Center, Colmar, PA 18915 (215) 822-1359	95%
77.	All State Auto	20	0	10,000	Warren Morgan	3131 N. I-10 Service Rd., Metairie, LA 70002 (504) 834-5500	80%
78.	Gatling's Auto Stores [20]	20	5	9,000	Albert C. Premus	117 W. Peach St., Connellsville, PA 15425 (412) 628-3340	90%
79.	Automyte	20	0	4,000	David Stucky	POB 578, Hemingway, SC 29554 (803) 558-3914	50%
80.	Auto Value Stores [20]	19	0	24,000	Allen Bennett	3869 N. Dixie Hwy., Oakland Park, FL 33334 (305) 565-4636	40%
81.	Molin Auto [22]	19	0	19,000	Carl E. Molin	3896 Union Rd., Buffalo, NY 14225 (716) 633-4455	15%
82.	Arnold Motor Supply	19	0	16,000	Garlan Odor	110 W. 4th, POB 5008, Spencer, IA 51301 (712) 262-4287	20%
83.	VIP Discount Auto [14]	19	57	14,000*	Thomas O. Auger	12 Lexington St., Lewiston, ME 04240 (207) 784-5423	40%
84.	Interstate Auto [19]	19	0	11,000	J. Lon Schuster	311 E. Dixie, Elizabethtown, KY 42701 (502) 765-6183	30%
85.	Flowers Auto Parts [16]	19	0	11,000	John R. Flowers	105 S. Center St., Hickory, NC 27603 (704) 322-5414	10%
86.	Loe's Auto Parts	19	0	10,000	John Loe	401 NE Front St., DeKalb, TX 75559 (214) 667-2541	30%
87.	Auto Parts World	18	0	18,000	Andrew Dabrowski	1176 W 14 Mile Rd., Clawson, MI 48017 (313) 288-0845	90%
88.	All-Car Automotive Centers	18	14	16,000	Lester R. Cigel	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791	80%
89.	Byrd's Auto [15]	18	0	13,000*	Stan Byrd	262 N. Main St., Burlington, NC 27215 (919) 226-0244	10%
90.	Von Housen Auto Parts	17	0	12,000	Robert Neeley	2634 Juniper Lane, Sacramento, CA 95825 (916) 485-7552	50%
91.	Acme Auto	17	0	12,000*	Curt Myers	1731 S. 19th St., Harrisburg, PA 17104 (717) 939-7893	20%
92.	National Auto Supply	17	0	12,000*	Clifford Shanfeld	8514 Eager Rd., St. Louis, MO 63144 (314) 968-8511	5%
93.	Parker Auto Supply [16]	17	0	12,000*	W.W. Parker	POB 760, Sumter, SC 29151 (803) 775-6721	10%
94.	Rodefeld's	17	0	11,000	Charles A. Rodefeld	96 W. Main, Richmond, IN 47374 (317) 935-7626	50%
95.	Hapco Auto Parts	17	0	10,000	Richard Halpern	POB 311, Hoyoke, MA 01041 (413) 536-2250	40%
96.	O.K. Auto Supply Co.	17	0	8,500	William Larson	605 Elm St., Ishpeming, MI 49849 (906) 485-5181	20%
97.	H.E. Everson Auto	17	0	8,000	Kirk Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	25%
98.	Champion Auto Stores [9]	16	80	75,000	Robert "Bud" Rose	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 536-5984	95%
99.	Hedahls Automotive Centers	16	0	16,000	Dick Hedahl	100 E. Broadway, POB 1038, Bismarck, ND 58502-1038 (701) 223-8393	20%
100.	National Auto Stores	16	0	11,000	David M. Stein	2342 North Penn Rd., Hatfield, PA 19440 (215) 997-1300	70%
Total		7,767	6,078	8,432,791*			

* Automotive Marketing estimate for 1989.
[9] Includes company-owned stores only; with franchises total is 141
[14] A member of the BPM (Roanoke, VA) buying group
[16] A member of the NAPA (Atlanta) programmed distribution group
[19] A member of the Federated Auto Parts (Staunton, VA) programmed distribution group
[20] A member of the Autovalue (Springfield, MO) programmed distribution group
[22] A member of the AAAD/Parts Plus (Memphis, TN) programmed distribution group
[28] A member of the Eagle Nation (Pearland, TX) programmed distribution group

THE *AM* FASTEST GROWING 10 CHAINS, 1989-1990

(The fastest growing chains, in terms of total stores listed in the October 1989 Top 100 list and this list.)

#	Chain	1989 List #	1990 List #	1989 Stores	1990 Stores	Total Growth	% Growth
1.	Quality	22	29	54	64	10	19%
2.	Advance	10	10	150	170	20	13%
3.	Taylor	28	39	32	36	4	13%
4.	Nationwise	8	7	247	275	28	11%
5.	Hi-Gear	21	30	56	61	5	10%
6.	ADAP	18	23	74	80	6	8%
7.	Trak	5	6	292	309	17	6%
8.	Carport	29	43	32	34	2	6%
9.	O'Reilly	16	18	102	107	5	5%
10.	Super Shops	12	12	140	145	5	4%

FASTEST GROWING CHAINS

Generally, in terms of growth, the aftermarket has been pretty level over the past year. Most experts put growth at around 2%.

Even so, some chains have managed to sustain growth at much higher rates than the industry level—without adding to the tremendous debt levels that have hurt many aftermarket chains recently.

In highlighting these chains, we have chosen to mark growth in terms of percentages, new stores as a percentage of the chain size in 1989. So, obviously a 200-store chain adding five stores is growing at a smaller percentage rate than a 10-store chain adding five stores.

JOBBER CHAINS

True jobber chains, doing over 75% of their business wholesale, don't encourage walk-in, DIY business. They concentrate on business to garages, car dealers, and service stations. They don't advertise to consumers and, in fact, keep a low profile generally. So you often don't hear of them.

However, chains like these have been around for almost as long as the aftermarket. Fisher, for example, was founded in 1929. And, they are putting together major operations that sell vast numbers of auto parts, chemicals, and accessories. They are major aftermarket players.

THE *AM* TOP 10 JOBBER CHAINS

(Chains doing 75% or more wholesale sales; showing place on Top 100 list.)

List #	Chain	100 List #	% Whsle	Address and Phone
1.	Fisher Auto Parts	11	80%	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901
2.	Sieg Auto Parts	16	95%	500 Iowa St., POB 4230, Davenport, IA 52808 (319) 323-3641
3.	General Parts	20	20%	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813
4.	Crow-Burlingame	28	75%	520 W. Capital, Box 111, Little Rock, AR 72203 (501) 372-5275
5.	Main Auto Parts	41	80%	1422 N. Main, Dayton, OH 45405 (513) 277-7393
6.	Anderson Auto Parts	42	85%	POB 767, Anderson, SC 29622 (803) 224-6321
7.	Northern Auto Supply Co.	46	75%	1906 N. Peach St., Marshfield, WI 54449 (715) 384-2124
8.	J. Burdman Auto Parts	47	85%	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787
9.	Barnes Motor & Parts	55	75%	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161
10.	SAS Auto Parts Co.	59	75%	129 Manchester St., Concord, NH 03301 (603) 225-4000

THE *AM* TOP 10 CHAINS BELONGING TO PROGRAMMED DISTRIBUTION GROUPS

(Showing percentage of retail sales)

List #	# of Chain	Stores	100 List #	% Retail	Programmed Distribution Group
1.	Genuine Parts	570	2	30%	NAPA, Atlanta
2.	APS	113	17	30%	Big A, Houston
3.	General Parts	102	20	20%	Carquest, Tarrytown, NY
4.	Straus-Frank Inc.	92	21	30%	Carquest, Tarrytown, NY
5.	A.I. Automotive	60	31	30%	Bumper to Bumper, NY
6.	Brooks Auto Parts/Supply	50	33	45%	NAPA, Atlanta
7.	Anderson Auto Parts	35	42	15%	NAPA, Atlanta
8.	Automotive One Parts Stores	28	50	45%	IWDA/Road Pro, Houston
9.	Cardis	27	53	45%	Carquest, Tarrytown, NY
10.	Davis & Wilmar	26	56	30%	NAPA, Atlanta

PROGRAM MEMBERS

In preparing this report, we spoke with over 400 automotive aftermarket chains that sell retail to a degree. Among other things we asked if they were members of programmed distribution groups and, if so, what the groups were. In all there were 19 different programmed distribution groups named.

However, among the ten largest chains to belong to these groups, only five groups were mentioned. And, two of the chains, Genuine Parts and Davis & Wilmar, actually own NAPA, their group, while APS owns Big A.

SPEED SHOPS

Some two decades ago there were over 10,000 U.S. specialty speed and performance shops. Today, the largest ten specialty chains among them operate only 223 stores.

This is because mail order retailers and regular retailers stock more specialty equipment. And, starting with the gas crises of the 1970s, automakers have stressed fuel economy over high speed performance. Finally, environmental considerations have led to restrictive legislation.

Now, emission control regulations cut into the speed and performance market. Where high performance stressed special exhaust products, now the accent is on dress-up equipment that gives the impression of speed without actually affecting the car's working equipment.

THE *AM* TOP 10 SPEED SHOP CHAINS

List #	Chain	# of Stores	CEO	Address
1.	Super Shops	145	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660
2.	Ben Pilla Speed Shops	28	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031
3.	Performance Centers of America	20	D.R. Raleigh	180 Whitman Ave., Edison, NJ 08817
4.	Rons Performance	7	R.T. Uemura	2760 Kilihau St., Honolulu, HI 96819
5.	Speed Unlimited Inc.	5	Peter Mandes	4771 Allentown Rd., Morningside, MD 20746
6.	PV Performance Centers	4	Brian Peavey	124 Eastern Ave., Malden, MA 02148
7.	Seco Performance Centers	4	John Simmons	417 University Blvd., Birmingham, AL 35203
8.	United Speed World	4	Terry Lewis	734 W. Brandon Blvd., Brandon, FL 33614
9.	High Tech Performance	3	S.J. Ventimiglia	7885 University Ave., La Mesa, CA 92041
10.	Jeg's High Performance Centers	3	Ed Coughlin	751 E. 11th Ave., Columbus, OH 43211
	Total	223		

REGIONAL MARKETS:
A LOOK AT SMOKESTACK EAST

by **P. Royall Katcher,**
Business Editor

The area we call the "Smokestack East" is bordered by the Great Lakes, Canada, Ohio, Maryland, and the urban sprawl running between Connecticut and Washington, DC. The region's rich soil and changing seasons make this prime farming country. Lancaster County, in Pennsylvania, has the nation's second largest farm population, at 25% of the county's population—many of them Old Order Amish. As well, the Northern New York State area is one of America's oldest wine growing regions.

But, Smokestack East is more marked by its many factories than its farms. The factories were first built early in the last century to take advantage of its central location, excellent water transportation system, and nearby ores. These ores include iron and coal. And, the nation's first oil fields, developed in the 1860s to replace whale oil lost to Confederate Navy raiders, were located in the area.

Today, the oil fields are abandoned, many of them turned into national parks. Many of the area's factories no longer thrive as they once did. Most of Pittsburgh's blast furnaces are cold. And, as singer/song writer Billy Joel said, they're closing factories, like the Mack Truck plant, down in Allentown, PA.

Hard work by concerned citizens has turned many of these trends around. Today, downtown Pittsburgh is booming, the home of many major corporations like Gulf Oil. And, Allentown has refurbished its downtown and has attracted many service and industrial companies to its area.

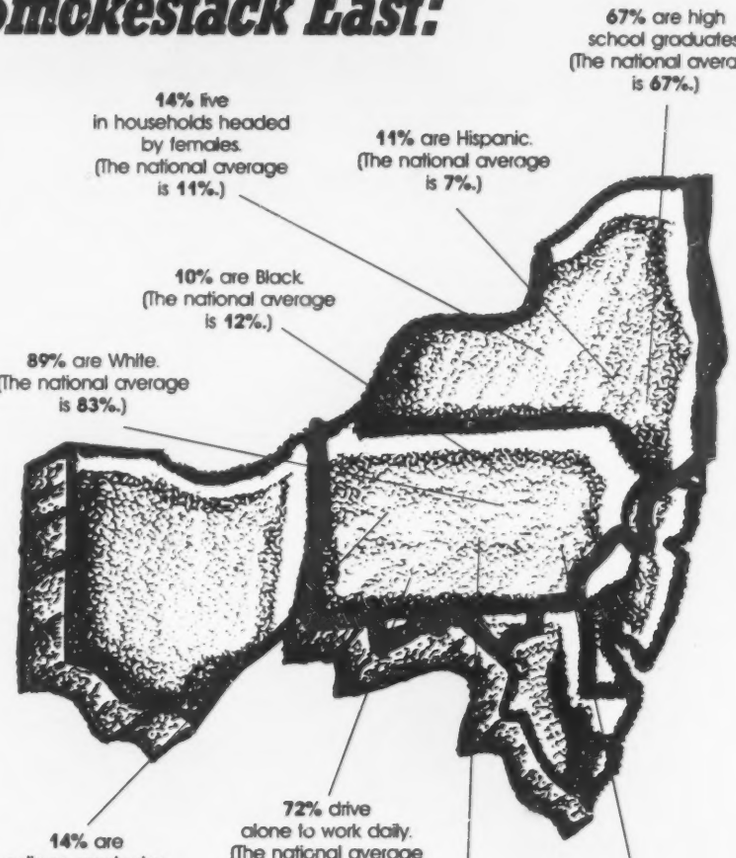
Although there are some large cities like Pittsburgh in Smokestack East, most of them are smaller than the giants on the East and West Coast or even nearby Chicago. Many inhabitants live on farms or in small towns. Many of those who don't retain small town values anyway.

Combined with these small town values of independence and hard work come the blue collar values taught in the mines, steel mills, and factories. The result is that Smokestack East residents maintain their own cars in large proportions—this is DIY country.

Weather's a major automotive DIY factor in Smokestack East. The average temperature in the northern half of the area during January is below freezing. In the southern half, it just hovers above the freezing mark. Hence, there's not a lot of driveway DIY work done in the winter here.

The traditional market is strong here. Steel City, a major feeder, is headquartered just outside Pittsburgh. Hahn Automotive, a WD that own 74 jobber stores, is based in Rochester, NY. But, true retailing chains do well here, too. Many of The Pep Boys—Manny, Moe, & Jack stores are in the area and do well. ■

Of The People In Smokestack East:


67% are high school graduates. (The national average is 67%.)
14% live in households headed by females. (The national average is 11%.)
11% are Hispanic. (The national average is 7%.)
10% are Black. (The national average is 12%.)
89% are White. (The national average is 83%.)
14% are college graduates. (The national average is 16%.)
72% drive alone to work daily. (The national average is 65%.)
8% live below the poverty level. (The national average is 12%.)
61% are between 18 and 65 years old. (The national average is 61%.)

52.1%
of individuals in Smokestack East who are responsible for vehicle maintenance do some sort of DIY work on that vehicle.

REGIONAL MARKETS:

In all, 52% of those who live in Smokestack East and are responsible for taking care of a motor vehicle do some of maintenance work themselves. On top of that, a surprising 11% aren't actually responsible for maintaining a vehicle, yet also do-it-themselves.

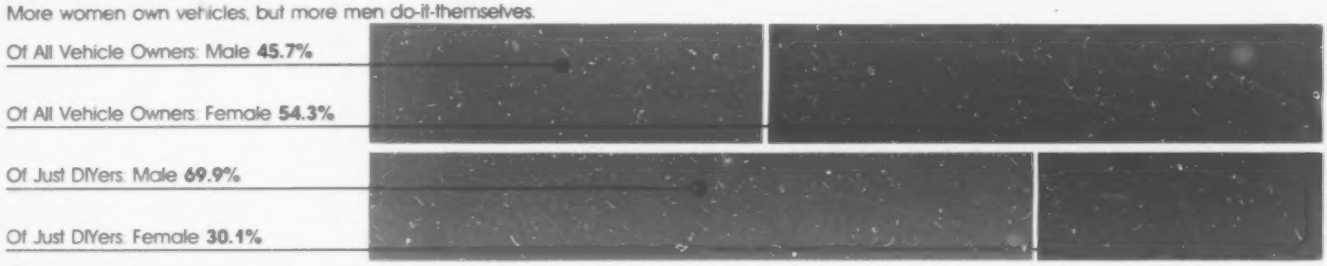
Some 6% of the Smokestack East DIYers we talked with shop for automotive parts, chemicals, and accessories about once a month. Another 16% shop twice a year, obviously for seasonal maintenance efforts, while 3% shop four times a year.

While 42% of Smokestack East DIYers have maintained the same automotive DIY work level, another 36% increased the level of work they do over the past five years. Over 25% of them expect the amount of automotive DIY work they do to increase in the future, while 59% expect to do as much DIY work in the future as they do now.

In all, 45% of Smokestack East DIYers classify themselves as "light" DIYers who only wax or polish or top off the oil in

SMOKESTACK EAST: GENDER

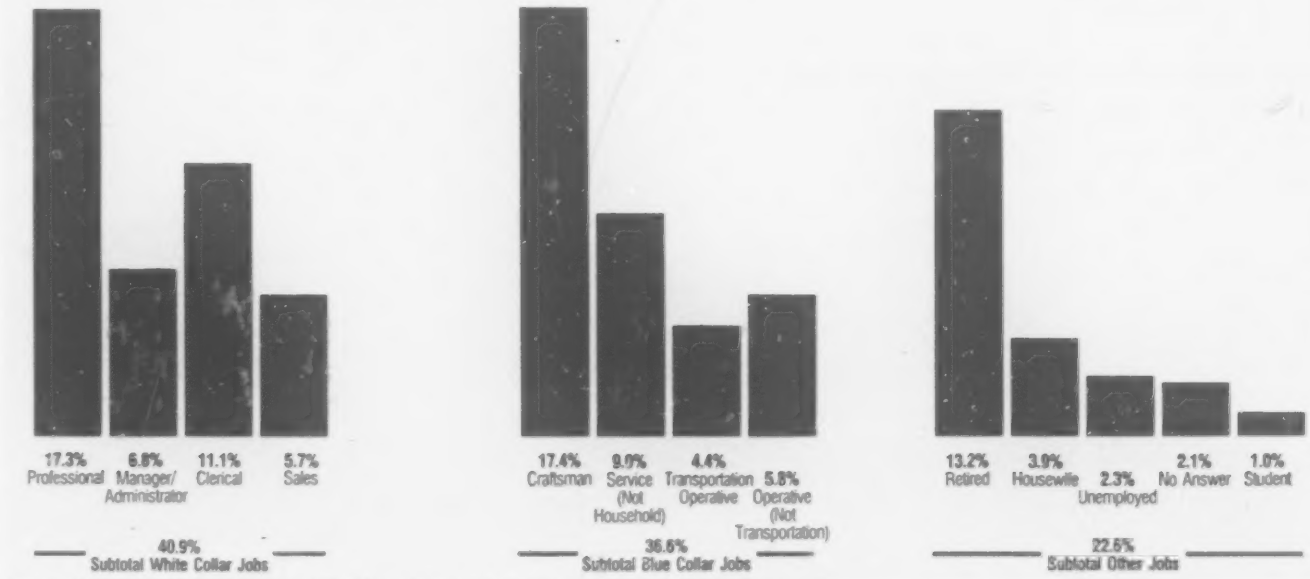
More women own vehicles, but more men do-it-themselves.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding

SMOKESTACK EAST: DIYERS & THEIR PROFESSIONS

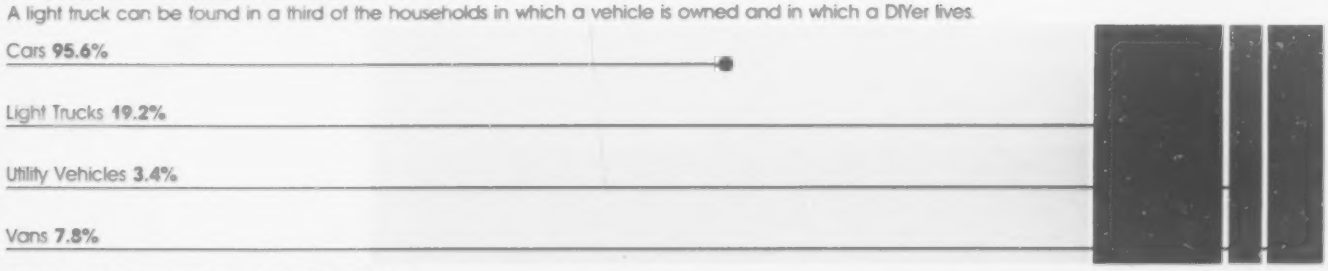
A higher number of farmers, students, service workers, and housewives in the area than in other areas has helped keep the growing white collar professions to less than half the employed population.



Source: 1990 Consumer Automotive Repair Study (CARS) May not total to 100% due to rounding and multiple answers

SMOKESTACK EAST: DIYER VEHICLE TYPES

A light truck can be found in a third of the households in which a vehicle is owned and in which a DIYer lives.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

SMOKESTACK EAST: DIYERS & THE VEHICLES THEY OWN

Of SMOKESTACK EAST DIYers, many more own a vehicle with a domestic nameplate than own a vehicle with a foreign nameplate.

Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding

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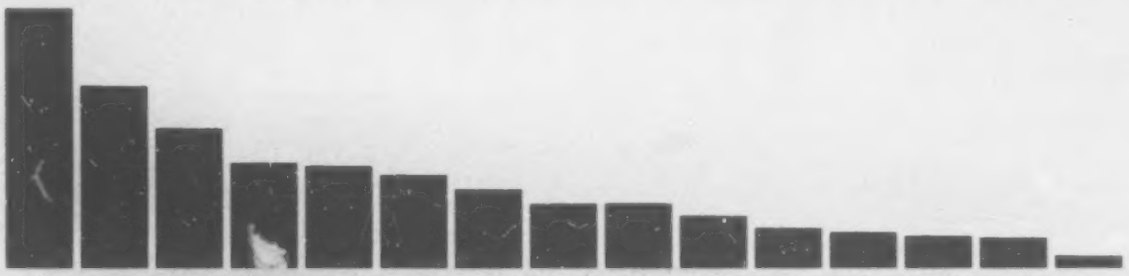
their vehicles. Some 25% of Smokestack East DIYers called themselves "medium" DIYers—those who actually change oil or filters. And 23% of Smokestack East DIYers said they were "dedicated" DIYers who weren't afraid of repairing their own transmissions or rebuilding their own engines.

Smokestack East DIYers generally enjoy what they do, too. Of them, 23% said that they enjoy doing automotive DIY work a lot. Another 36% enjoy it "somewhat." The rest enjoy it "not too much," 16%, or "not at all," 26%.

Many of them would like to do other jobs than what they do now. When we asked what job they'd be interested in learning how to do, 12% said "tune-ups," 10% said "oil and filter changes," 7% said "body work," and 5% said "brake work." Over half of them want to learn these new jobs from friends or relatives. But 34% said they'd turn to books and literature to learn new jobs. And, 30% said they'd go to clinics, while 28% said they'd like to use videos for their learning. ■

SMOKESTACK EAST: DIYERS & THEIR VEHICLES

With a quarter of the DIYers owning Chevrolets, the industrial center of America is also the heartbeat of America. Here's a list of the most popular makes and the percentage of DIYers who own them.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

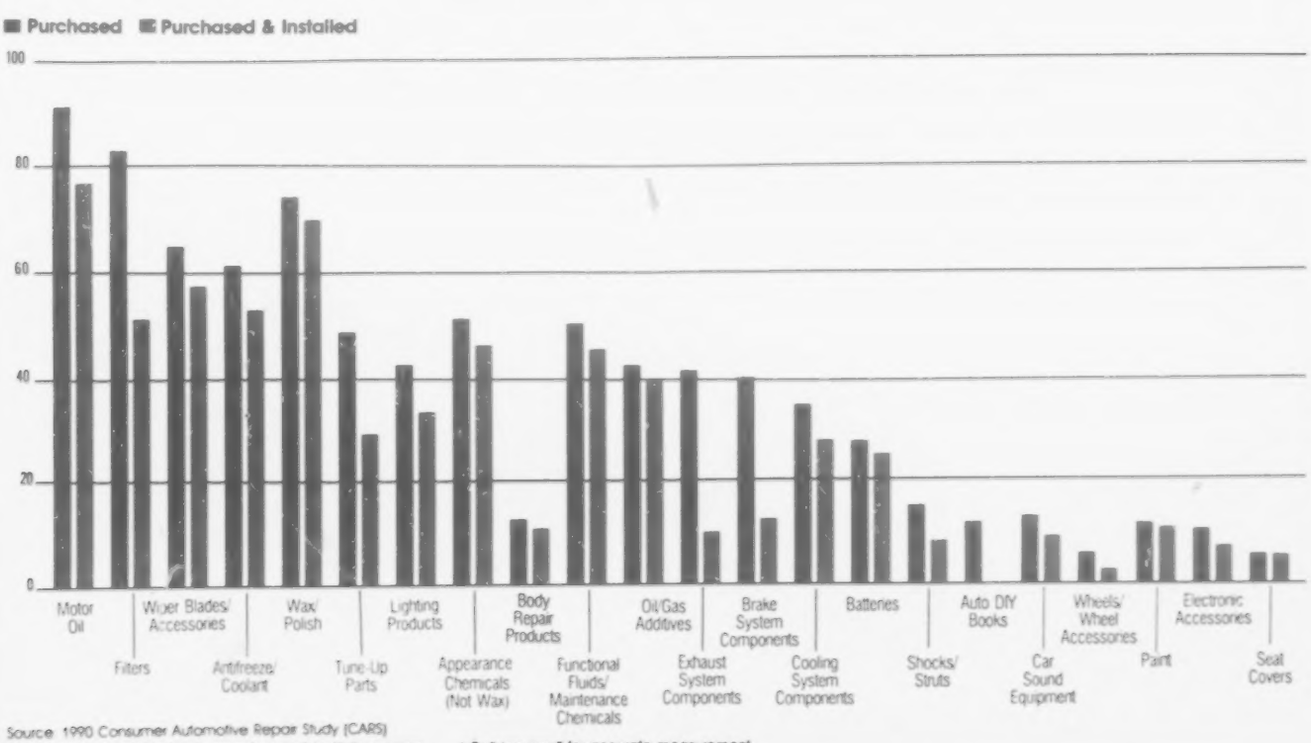
SMOKESTACK EAST: SHOPPING FREQUENCIES

Of Smokestack East DIYers, almost 20% of them shop for automotive products five or six times a year. Here are the three major shopping frequencies.

Source: 1990 Consumer Automotive Repair Study (CARS)
Does not total to 100% due to omitted responses

SMOKESTACK EAST: DIYERS & AUTOMOTIVE PRODUCTS

The easier the product is to install, the more DIYers do-it-themselves.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

* Cell too small for accurate measurement